

100

EZ-Broker**Internet based solution for all phases of the structured settlement process**

- One time input or download of case data
- Can be used online or offline
- Diary functionality includes automatic reminders
- Interfaces with embedded life company software for quoting and illustration
- Proposal management systems allows full customization
- Integrated post-settlement document processing
- Modification of documents as permitted by life companies
- Save print, fax and e-mail capabilities for any documents within the software
- Integrated life case plans and economic loss analysis through StructureOnline partners
- Automatic referral of cashouts and upfront cash to designated Financial Planners
- Data archiving and reporting available through StructureOnline
- Interfaces with broker company systems

STRUCTUREONLINE

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EZ-Lead (EZ-Broker included)**Employs data mining and knowledge technology to identify structure candidates in claims systems**

- Electronic interface with claims systems
- Automatic analysis of claims to identify structure opportunities
- Knowledge based system proposes appropriate structure products
- Claims users can propose structure programs or forward referrals to brokers

30

EZ-Reports (for Brokers)**Full-featured reporting module for EZ-Broker****Local:**

- Full sort and selection criteria (e.g. by life company, client-broker)
- Open cases
- Settled cases
- Closed cases
- Premium and/or commission totals
- Case related assignments for support staff
- Many more will be defined and developed as per industry need

Remote:

- Any Reports out of the Archived Data
- Many more will be defined and developed per industry need

Fig 1 A

140 EZ-Reports (for Life Companies)**Full-featured reporting module for Life Company Executives**

- Full sort and selection criteria (e.g. by broker company, individual broker insurer)
- Premium and number of cases funded
- Cases quoted
- Premium by structure product
- Cases accepted/rejected under partnership arrangements (last right of refusal)
- Cash referred to financial planners
- Many more will be defined and developed as per industry need

150 EZ-Updates**Internet-based support for delivery of life company software, updates and rate changes**

- All functions are provided through the StructureOnline portal
- Download of life company software by authorized parties
- Distribution of software upgrades and patches
- Distribution of rate changes
- Automatic notification of updates to EZ-Broker users

StructureOnline Services**160 EZ-Sync****Allows full-use of StructureOnline's broker services by broker companies, individual brokers and support staff**

- Allows brokers to download portable version of EZ-Broker for use offline
- Brokers and support staff can synchronize their work, data, schedule, diary cases, etc.
- Software updates are executed automatically
- Rate changes are made automatically

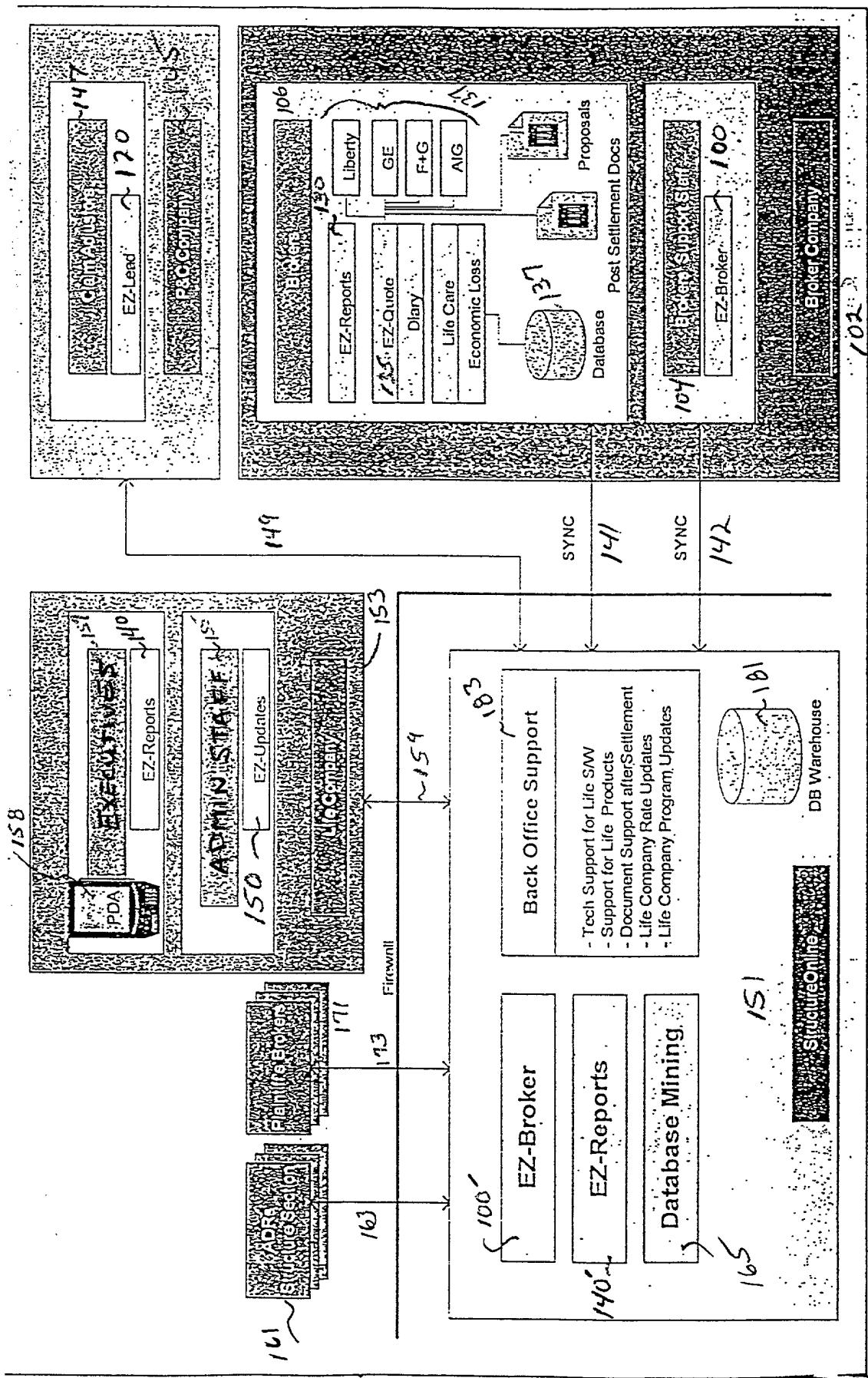
170 EZ-Support**StructureOnline help desk for life companies and brokers**

- Technical support for life company software
- Support for life products
- Maintain latest life company software on the web for download
- Maintain latest software patch for life company, software on the web for download
- Maintain rate changes on the web as publication
- Other services based on user demand

180 Alternative Dispute Resolution Provider Affiliation**Brings a new source of cases to the structure industry**

- Custom templates for ADR web pages
- Allows structured settlements to be offered as part of the ADR process
- Structure products from participating life companies offered through StructureOnline
- Referral of cases to participating brokers facilitated by StructureOnline

Fig. 1B



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Online Broker (Web version of EZ-Broker)**Allows easy access to structure products to qualifying professionals, generates new structure business**

- Service offered to qualified parties via the Internet
- StructureOnline facilitates company approval and licensing issues

FIG. 1C

Creating a New Case

Mandatory Field Requirements for opening a case

- Case Caption
- Broker and Broker of Record

FIG 3

Creating a New Case (continued)

- Add / Edit Insurer Client Information from Client Tab
- National Account Check Box for narrowing your search
- Mandatory fields for Insurer
 - Insurer Company Name
 - Date of Case Receipt

F1G 4

Creating a New Case (continued)

- Add / Edit Law Firm Client Information from Client Tab

F1G 5

- Mandatory fields for Law Firm
 - Attorney Type
 - Law Firm Name
 - Attorney Name

Creating a New Case (continued)**▪ Add / Edit TPA Client Information from Client Tab**

Select Client: TPA

Select TPA

Search Group

Search Company

Search

Company: Select Company

Branch: Select Branch

Contact: Select Contact

Case Details

Claim No. Date of Assign.

Reserved Amount Authorized Amount Recent Offer

Notes

Add Cancel

▪ Mandatory fields for TPA

- TPA Company Name

FIG 6

Creating a New Case (continued)**▪ Add / Edit Other Client Information from Client Tab**

Select Client: Other

Select Other

Search Group

Search Company

Search

Company: Select Company

Branch: Select Branch

Contact: Select Contact

Case Details

Claim No. Date of Assign.

Reserved Amount Authorized Amount Recent Offer

Notes

Add Cancel

▪ Mandatory fields for Other Client

- Other Company Name

FIG 7

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Creating a New Case (continued)

- Add / Edit Claimant Information from Claimant Tab

Contact Details

Claimant Type: **Individual** Company:

Prefix: First Name: Middle Name: Last Name: Suffix:

Address: Address 2: City:
State: Zip: Country: Select

Phone Day: Phone Eve: Phone Cell:
Fax: Email: Pager:

Personal Details

Birth Date: Age: Sex: Female SSN:
Occupation: Education: Annual Income:

Case Details

Primary Injury: Select Demand Amt: Structured Amt: Upfront Cash:
Notes:

Supplemental Benefits: SSDI SST Medicare Medicaid Food Stamps Other

FIG 8

Creating a New Case (continued)

Bank Info

Mail Annuity Payment To: Annuitant Address: Bank Account: Payee:

Bank Name: Address 1: Address 2:
City: State: Zip:
Account Name: Account No: Routing No:

Add Cancel

- Mandatory fields for Claimant

- First Name and Last Name
- Date of Birth and Age

- Contact Details
- Personal Details
- Case Details
- Bank Information

FIG 9

Creating a New Case (continued)

- Add / Edit Insured Defendant Company Information from Defendant Tab**

The screenshot shows a software interface for managing legal cases. At the top, there's a navigation bar with icons for Caserinfo, Client, Claimant, Defendant, Attorney, Insurer, Broker, Payee, and Fact sheet. Below this is a sub-menu for 'Select Defendant'. It includes dropdowns for 'Insured Type' (set to 'Insured'), 'Defendant Type' (set to 'Company'), 'Search Name', 'Select Company' (set to 'Select'), 'Select Branch' (set to 'Select'), and 'Policy Number'. There are also fields for 'Policy Amount' and 'Notes'. At the bottom of the form are 'Add' and 'Cancel' buttons.

- Mandatory fields for Insured Defendant**

- Company Name

F1G 10

Creating a New Case (continued)

- Add / Edit Plaintiff Attorney Information from Attorney Tab**

This screenshot shows the 'Select Attorney' section of the software. It features a navigation bar with icons for Caserinfo, Client, Claimant, Defendant, Attorney, Insurer, Broker, Payee, and Fact sheet. Below is a 'Select Attorney' form. It includes dropdowns for 'Attorney Type' (set to 'Plaintiff') and 'Law Firm' (set to 'Law Firm of Boston'). There are fields for 'Attorney Name' (set to 'Select'), 'Assistant Phone', 'Assistant Email', and 'Notes'. A checkbox labeled 'Structure Attorney fees' is checked. A note says 'Select Claimant (For Multiple, CTRL+Click)'. At the bottom are 'Add' and 'Cancel' buttons.

- Mandatory fields for Plaintiff Attorney**

- Attorney Type
- Law Firm
- Attorney Name

F1G 13

Creating a New Case (continued)

- Add / Edit Insured Defendant Individual Information from Defendant Tab

The screenshot shows a software interface titled 'Select Defendant'. At the top, there are tabs for 'Caseinfo', 'Client', 'Claimant', 'Defendant' (which is selected), 'Attorney', 'Insurer', 'Broker', 'Payee', and 'Fact sheet'. Below the tabs, there are dropdown menus for 'Insured Type' (set to 'Insured') and 'Defendant Type' (set to 'Individual'). A search bar labeled 'Search Name' with a placeholder 'Search' and a 'Search' button is present. Below the search bar are dropdown menus for 'Select Defendant' (set to 'Select') and 'Select Contact' (set to 'Select'). There are also fields for 'Policy Number' and 'Policy Amount'. A 'Notes' text area is at the bottom. At the very bottom are 'Add' and 'Cancel' buttons.

- Mandatory fields for Individual Insured Defendant
 - Defendant Type

FIG 11

Creating a New Case (continued)

- Add / Edit Self Insured Defendant Information from Defendant Tab
- Mandatory fields for Self Insured Defendant

- Company name

This screenshot is identical to FIG 11, showing the 'Select Defendant' screen for an insured defendant. The only difference is in the dropdown menu for 'Insured Type', which is now set to 'Self Insured'. All other fields and layout are the same.

FIG 12

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Creating a New Case (continued)

- Add / Edit Defense Attorney Information from Attorney Tab

The screenshot shows the 'Attorney' tab selected in a software interface. The main area contains fields for 'Attorney Name' (Gilkberg, Milon I. Lumberjack Roth), 'Law Firm' (Ricks Law Firm), 'Assistant Name', 'Assistant Fax', 'Fee', and 'Notes'. To the right, there's a 'Search by Firm' section with a dropdown for 'Attorney Name' (selected: 'Ricks Law Firm') and a 'Search' button. Below this is a 'Structure Attorney Fees' section with dropdowns for 'Select Client' (Jennifer Jensen) and 'Select Firm' (Allstate Prop & Cas Ins Co). At the bottom are 'Add' and 'Cancel' buttons.

- Mandatory fields for Defense Attorney
 - Attorney Type
 - Law Firm
 - Attorney Name

FIG 14

Creating a New Case (continued)

- Add / Edit Insurer Information from Insurer Tab

The screenshot shows the 'Insurer' tab selected. It includes fields for 'Search Group', 'Search Company' (Company dropdown set to 'Select Company'), 'Branch' (Branch dropdown set to 'Select Branch'), 'Contact' (Contact dropdown set to 'Select Contact'), and 'National Account' (checkbox checked). Below these are sections for 'Case Details' with fields for 'Reserved Amount', 'Authorized Amount', 'Recent Offer', and 'Notes'. At the bottom are 'Add' and 'Cancel' buttons.

- Mandatory fields for Insurer
 - Company Name

FIG 15

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Creating a New Case (continued)

- Add / Edit Broker Information from Broker Tab

Surn Dennis I

Select Broker

Company: Structured Financial Associates Last Name:

Broker: Broker of Rec. No:

Commission: 0 % Prod. Credit:

Notes:

Add Cancel

- Mandatory fields for Broker

- Broker Company Name
- Broker Name

FIG 16

Creating a New Case (continued)

- Add / Edit Payee Information from Payee Tab

- Mandatory Fields

- First Name
- Last Name

, Upfront Cash:). Buttons for Add and Cancel are at the bottom."/>

Hall Mike I

Contact Details

Name: Hall Mike Type: Suffix:

Prefix: First Name: Middle Name: Last Name:

Address: Address: City:
State: Zip: Country:
Phone: Phone Ext: Phone Cell:
Fax: Email: Paper:

Personal Details

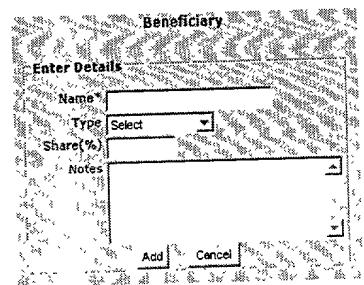
Birth Date: 02/22/1965 Age: 37 Sex: SSN: Upfront Cash:

Notes:

Add Cancel

FIG 17

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Creating a New Case (continued)**▪ Add / Edit Beneficiary Information from Payee Tab****▪ Mandatory Fields**

- Name

FIG 18

Managing your Diary**▪ Types of Companies**

- Assignment Company
- Broker Company
- Insured Defendant
- Insurance Company
- Law Firm
- Life Company
- Other
- Self Insured Defendant
- TPA

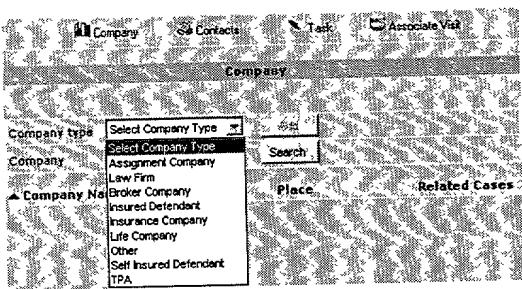


FIG 19

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Managing your Diary

- Open your Diary & Search & Sort / Add a Company by Type

- View Cases related to Company from search result

FIG 20

Managing your Diary

- Categories of Companies
 - Public
 - Private

FIG 21

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Managing your Diary (continued)

- Contact Listing at each Level

Branch List	Add New Branch	Contact List	Add New Contact
Name	Phone	Address	
Angel Viera	323-869-3637	500 Citadel Drive 2nd Floor City of Commerce Commerce , CA - California , 90040	
Carole Carlson	806-674-9357	302 W. Main Street Suite 103 Avon , CT - Connecticut , 06001	
Chuck Berry	918-461-2064	7341 East 75TH Street , Tulsa , OK - Oklahoma , 74133-2816	
Edward Whalen	910-733-7315	2503 S. Linden Road Flint , MI - Michigan , 48522	
Jacqueline Viola	636-939-1249	607 Vista Hills Court Eureka , MO - Missouri , 63025	
John Stamford	770-951-0686	6445 Powers Ferry Road #195 Atlanta , GA - Georgia , 30339	
Joseph Long	215-348-7244	350 S. Main Street Suite 209 Doylestown , PA - Pennsylvania , 18901	

FIG 22

Managing your Diary (continued)

- Remember to use <Type = Company>, if desired to show under Drop Down List

Broker-->Company--> Structured Financial Associates <[Back to Main](#)

Company Type Category:	Company Name:	Company Code:	Group Name:
Company	Public	Structured Financial Assoc	SFA
Select Group			
Address			
Address1:	330 N Charles Street	City:	Baltimore
Address2:	Suite 400	State:	MD - Maryland
		Zip:	21201
		Country:	United States
Communication			
Phone:	410-547-0112	Fax:	410-547-2705
Email:	Email		
URL:	URL		
Save		Cancel	

FIG 23

Managing your Diary (continued)

- Search Contact by First Name, Last Name and/or Type

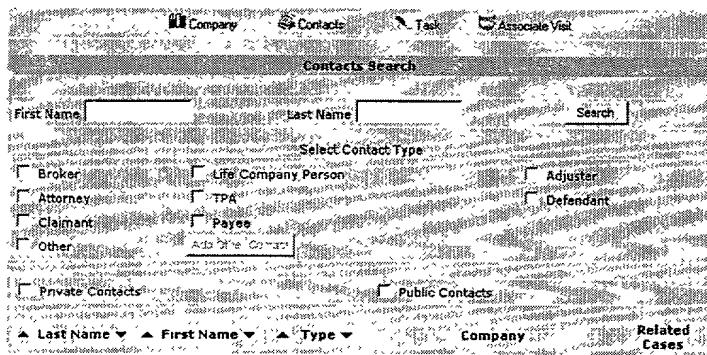


FIG 24

Managing your Diary (continued)

- Sort searched contacts using arrows

Last Name	First Name	Type	Company	Related Cases
Felshy	Audra	Broker	Structured Financial Associates	None
EDR	K.D.	Payer	Structured Financial Associates	None
Todhi	Ramna	Payer	Structured Financial Associates	View Cases
MEZGEBE	AARAN	Claimant	Structured Financial Associates	None
Bowers	Aaron	Claimant	Structured Financial Associates	None
BROWN	KARON	Claimant	Structured Financial Associates	None
BRUMFIELD	AARON	Claimant	Structured Financial Associates	None
BRUNELL	AARON	Payer	Structured Financial Associates	None
DURKEE	Aaron	Claimant	Structured Financial Associates	None
CHAVEZ	AARON	Claimant	Structured Financial Associates	None

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FIG 25

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Managing your Diary (continued)

- View cases related to Contact from search result

Last Name	First Name	Type	Company	Related Cases
Walmann	Achim	Broker	Diversified Settlements, Inc.	None
Swanson	Alex	Broker	Structured Security Co.	None
Frisbee	Alice	Broker	Structured Security Co.	View Cases
Cooper	Alice	Broker	Brant Hickey & Associates	None
Hull	Allan	Broker	Structured Security Co.	None
Richardson	Allan	Broker	The Alliance Settlement Cos.	None
Paul	Amy	Broker	Summit Settlement Services	None
Fisher	Andrew	Broker	Settlement Options	None
Hull	Andrew	Broker	Settlement Associates & Insurance Services, Inc.	None
Viera	Angel	Broker	American Settlement Corp.	None

<< << >> >> Page: 1 of 2

- Contact Category

- Public
- Private

FIG 26

Managing your Diary (continued)

- Check Box for
 - Case Coordinator in Life Company
 - Broker in Broker Company
 - Attorney in Law Firm
 - Claim Adjuster in Insurer / TPA
 - Primary Contact in All Contacts

Edit CONTACT Information > Broker -> STRUCTURED Financial Associates

Contact Category	Public	<input checked="" type="checkbox"/> Broker	<input type="checkbox"/> Primary Contact			
Prefix	Mr.	First Name	Middle Name	Last Name	Office Title	
	Mrs.	Alice	M.	Frisbee	CSSC	
Address						
Address	100 Stockyards Road		City	South St. Paul	Zip	55075
Address	Suite 144		State	MN - Minnesota	Country	United States
Communication						
Phone	651-451-3567		(Day)	Phone	(Ext.)	
Fax	651-451-4093			Fax		
Email	alfrisbee@aol.com					
Communication Type:	Structure	None	<input type="checkbox"/> Email	<input type="checkbox"/> Fax		
Notes						
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						

FIG 27

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Managing your Diary (continued)

- Communication Type Check Box
 - StructureOnline Exchange
 - Fax
 - Email

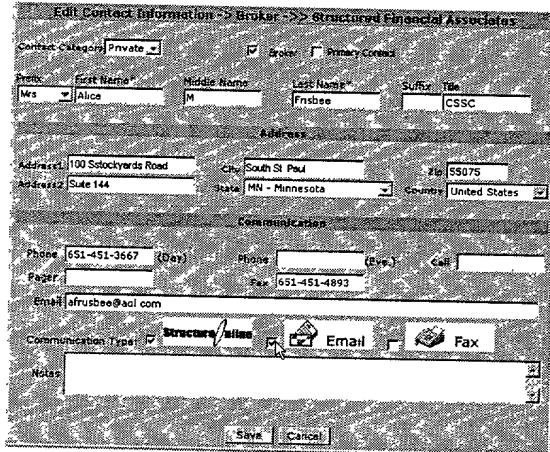


FIG 28

Managing your Diary (continued)

- Tasks – Open, Close, Details, Calendar

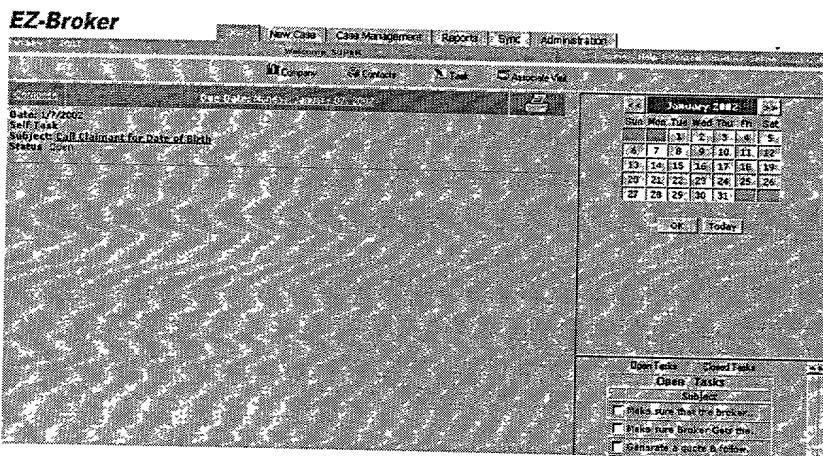


FIG 29

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Managing your Diary (continued)

- Composing Non-case related task
 - From Home Page -> Compose
 - From Diary -> Task -> Compose

FIG 30

Managing your Diary (continued)

- Tracking visits to Clients (National Accounts only)
 - Name of the Insurance Company / Branch
 - Date of the Last Visit
 - Purpose
 - Next visit schedule
 - Cases Received
 - Notes

Last Visit	Insurance Company / Branch / Broker	Activity	New Visit	Cases Received
1/2/2002	American States Ins Co of TX/Broker: Suss Donald	Introduction	No	0
1/2/2002	Travelers Indemnity Co of CT/Broker: Swart Jeffrey	Introduction	No	0
1/3/2002	SAFECO NATIONAL INSURANCE CO/Broker: Luke John	Received Cases	No	1
1/3/2002	SAFECO NATIONAL INSURANCE CO/Broker: Luke John	File Review	No	0
1/5/2002	Employee Benefits Adair Warren/Broker: Adair Warren	File Review	Yes	0
1/7/2002	Allianz of America/Broker: Adair Warren	Introduction	No	0
1/7/2002	CRUM AND FORSTER NATIONAL INSURANCE/Broker: Swart Jeffrey	Advise Training	No	1

FIG 31

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Searching for an existing Case (continued)

- From Home Page

- Most recently worked on 10 cases

File No.	Case Name	Date of Loss	Status
SFASuper1219200133027AM	Paul vs Manor Care	1/2/10/1998	LEAD ACCEPTED
SFASuper1219200133459AM	Ann Vs Lovers	8/9/2000	LEAD ACCEPTED
SFAMaryb1217200181403PM	Shirley Vs UPS	10/12/1999	LEAD ACCEPTED
SFASuper1219200132551AM	Sarah Vs Timberline Inc	1/2/10/2001	LEAD ACCEPTED
SFASuper1219200133248AM	Chns Vs Orade Corp	4/9/1999	LEAD ACCEPTED
SFASuper1218200191943AM	Larry Vs Hands & Associates	5/7/2001	LEAD ACCEPTED
SFASuper12122001111904AM	Tommy Vs United Airlines	1/1/10/2000	LEAD ACCEPTED
SFASuper12172001103120PM	Chns Vs General Electric	3/9/2001	LEAD ACCEPTED
SFASuper1219200150223AM	Larry vs Whirlpool	10/12/2001	LEAD ACCEPTED
SFASuper1217200144127PM	Charlie vs EMC	4/9/1999	LEAD ACCEPTED

[CLICK HERE FOR MORE...](#)

- Based on Past Due Tasks

Date	Case	Subject	Priority
11/10/2001			
12:55:00 PM	UHALT, CHARLES	Quote Followup - uhalt	
12/10/2001			
12:40:00 PM	UHALT, CHARLES	Quote Followup - uhalt	
11/08/2001			
2:23:00 PM	FUENTES, ALEY	Quote Followup - fuentes	
11/08/2001			
2:21:00 PM	FUENTES, ALEY	Quote Followup - fuentes	
10/31/2001			
10/26/2001	GRABER, MICHELLE	test	
10/26/2001			
3:06:00 PM	PEACE, SHEILA*	Quote Followup - sheila	
10/24/2001			
5:06:00 PM	YAMADA, KERRY	Quote Followup - kerry	

FIG 32

Searching for an existing Case (continued)

- From Case Management

- Multiple Search Criterion

EZ-Broker

[Date] [New Case] [Report] [Sync] [Administration]

Welcome, [User]

Search Cases

Search by Name	Search by Date
Case Name:	Date of Loss:
Defendant:	Attorney:
Injured:	Law Company:
Defender:	Complaint:
Plaintiff:	Settlement:

Search by Case Type

Commercial	Personal Injury	Workers Compensation
Other	Automobile	Medical Malpractice
Personal Injury	Product Liability	Employment
Workers Compensation	Environmental	Family Law

Search by Law Status

LEAD ACCEPTED
CASHED
ES-CUSTO
ES-CUSTO LOCKED
ES-CUSTO ACCEPTED
ES-CUSTO VERIFIED
ES-DOCUMENTS VERIFIED
ES-CUSTO FUNDED
FIRST PAYMENT MADE
COMMISSION RECEIVED
COMMISSION REFUNDED

Buttons: Search | Cancel

FIG 33

Searching for an existing Case (continued)

- From Diary
 - Based on Company of any Type

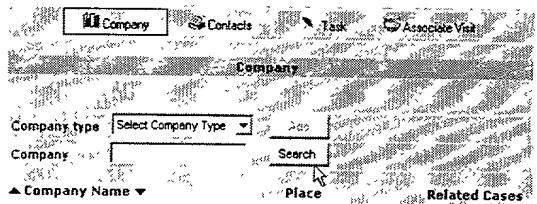


FIG 34

Searching for an existing Case (continued)

- From Diary
 - Based on Contact Person of any Type

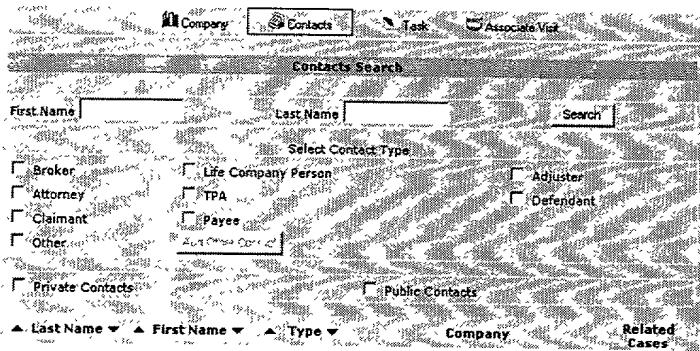


FIG 35

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Generating a Quote for Fully Integrated Life Company (continued)

- Select Claimant & Life Company; Click "Enter Quote Data"

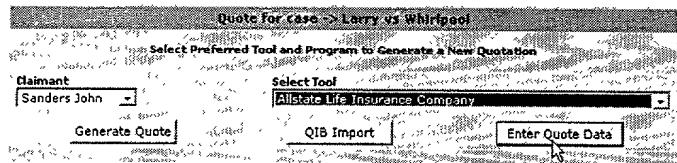


FIG 36

Generating a Quote for Fully Integrated Life Company (continued)

- Select the Rate Series; Save the Quote

FIG 37

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Generating a Quote for Fully Integrated Life Company (continued)

- Start adding benefits & click "Calculate"; Save at the end

The screenshot shows the Allstate Quotewizard software. At the top, it says "Quote Modified: 1/15/2002" and "Quote Name: JOHNSANDERS/2002". Below that, there's a section for "Beneficiaries" with two entries:

- John Sanders: Current Cash - \$10,000.00
DOB: 01/01/1930 Age: 22 Sex: Male Life Exp: [] R. Age: 22 Sur. Val: []
- Kirk Hall: Current Cash - \$8,000.00
DOB: 12/23/1971 Age: 31 Sex: Male Life Exp: [] R. Age: 31 Sur. Val: []

Below the beneficiaries, there's a "Basic Information" section with fields for "Special Life Co. Approval", "Rate Code", "Accepted Date", and "Verified Date". There's also a "Notes" area with a text box.

At the bottom, there's a table titled "Add New Benefit" with columns for "Benefit Type", "Amount", "Mode", "No. of Pmts.", and "COAL (%)".

Benefit Type	Amount	Mode	No. of Pmts.	COAL (%)
Joint Life	\$2,000.00	Monthly	20	11.00 Premium
		Guaranteed		
		Expected		
		Actual		

Buttons at the bottom include "Save", "Cancel", and "Add Another".

FIG 38

Generating a Quote for Partially Integrated Life Company (continued)

- Select Claimant & Life Company; Click "Generate Quote"

The screenshot shows the Liberty Life Assurance Co. of Boston software interface. At the top, it says "Quote for case: Larry vs. Whirlpool". Below that, it says "Select Preferred Tool and Program to Generate a New Quotation".

A dropdown menu labeled "Claimant" is open, showing "Hall Mike". To the right of the dropdown are four buttons:

- "Select Tool" (Liberty Life Assurance Co. of Boston)
- "Generate Quote"
- "QIB Import"
- "Enter Quote Data"

FIG 39

Generating a Quote for Partially Integrated Life Company (continued)

- QIB Tool is opened now; Click File -> Import; Select file C:\QIBImpExp\filename.exp

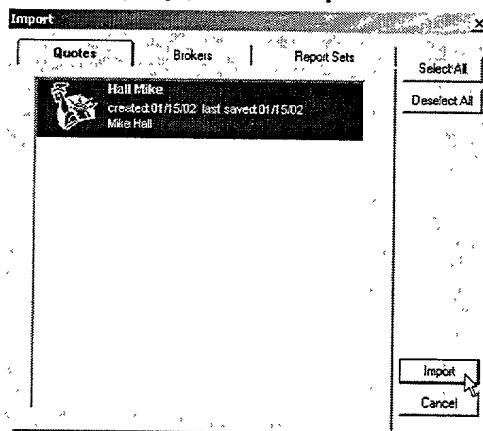


FIG 40

Generating a Quote for Partially Integrated Life Company (continued)

- Quote data has been Imported now; Click File -> Open Quote -> Edit

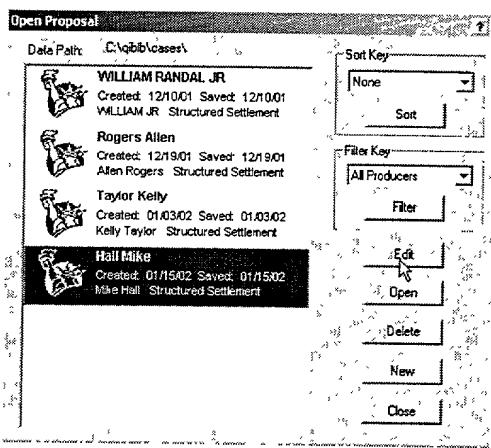


FIG 41

Generating a Quote for Partially Integrated Life Company (continued)

- Check all imported information from Quote Specification or Quick Quote window.
- Start adding benefit information -> Add Benefit
- Quote String Carryover between Tools (Change mode if not mentioned)
- Save -> Quote Name ->Ok

The screenshot shows the 'Quick Quote' interface. It includes fields for Quote Date (01/15/2002), Purchase Date (01/15/2002), Lock (No), Assignment Co., Assignment (Yes), and various demographic and benefit selection dropdowns. Below this is a 'Benefits' section with a table for premium calculations. A 'Save As' dialog box is overlaid, showing 'Quote Name: HSIMK' and buttons for 'OK' and 'Cancel'. At the bottom are 'Preview', 'Quick Print', 'Clear', 'Save', and 'Quit' buttons.

FIG 42

Generating a Quote for Partially Integrated Life Company (continued)

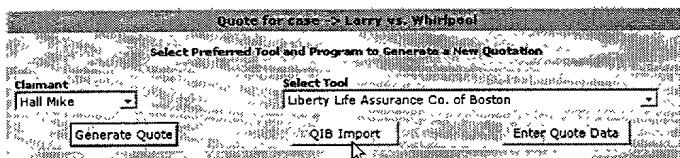
- To Export Quote Data; File-> Export
- Select file C:\QIBImpExp\claimantname.exp
- > Click on Save

The screenshot shows the 'Export' dialog box. It lists several entries under 'Quotes' and 'Brokers'. The 'Quotes' list includes 'WILLIAM RANDAL, JR', 'Rogers Allen', 'Taylor Kelly', and 'Hall Mike'. The 'Brokers' list includes 'WILLIAM JR', 'Allen Rogers', 'Kelly Taylor', and 'Mike Hall'. On the right side, there are 'Select All' and 'Deselect All' checkboxes, and at the bottom are 'Export' and 'Cancel' buttons.

FIG 43

Generating a Quote for Partially Integrated Life Company (continued)

- Click on QIB Import



- Click on Browse and select the file to Import; Click on Import -> Close

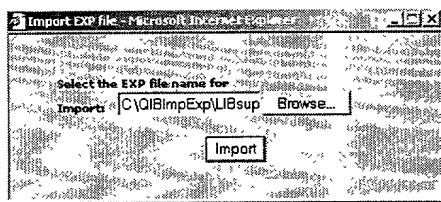
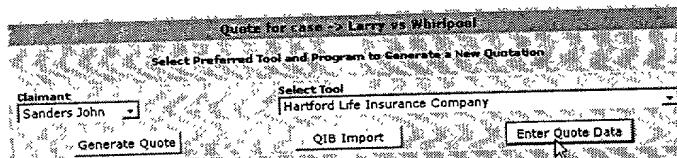


FIG 44

Generating a Quote for not Integrated Life Company (continued)

- Select Claimant & Life Company; Click "Enter Quote Data"



- Copy / Paste the data from Life Company Tool manually (Unfortunately)

FIG 45

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Generating a Quote for not Integrated Life Company (continued)

- Select the Rate Series; Save the Quote
- Start adding benefits & click "Calculate"; Save at the end

FIG 46

Proposal - Documents (continued)

- Select the Quote & Appropriate Proposal Template; Click "Generate Proposal"

FIG 47

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Cover Letter - Documents (continued)

- Creating a Cover Letter to Life Company

Quotes, Proposals and Cover letters

Quote Name	Life Carrier	Status	Benefit	Cover Letter
FoxProCase#77316	LIBERTY LIFE	Accepted	\$40.00	<input type="button" value="Cover Letter"/>
MICHAEL SABATINO/2001	Allstate Life Insurance Company		\$202,000.00	<input type="button" value="Cover Letter"/>
Cover Letter	>> CoverLetter12-3-200112-50-59PM.doc			
Proposal Document	>> Q_Michael Sabatino12-3-200112-44-45PM.doc			
MICHAEL SABATINO/2001	Allstate Life Insurance Company		\$24,240.00	<input type="button" value="Cover Letter"/>

Cover Letter for -->Allstate Life Insurance, Company

Select template file: C:\SSO\ezbroker\Template\CoveringLetters\coverletter.doc

Generate Cover Letter for:

Select Company: Use:

Generate Cover Letter | Done

FIG. 48

Cover Letter - Documents (continued)

- Creating a Cover Letter to Insurance Company

Quotes, Proposals and Cover letters

Quote Name	Life Carrier	Status	Benefit	Cover Letter
FoxProCase#77316	LIBERTY LIFE	Accepted	\$40.00	<input type="button" value="Cover Letter"/>
MICHAEL SABATINO/2001	Allstate Life Insurance Company		\$202,000.00	<input type="button" value="Cover Letter"/>
Cover Letter	>> CoverLetter12-3-200112-50-59PM.doc			
Proposal Document	>> Q_Michael Sabatino12-3-200112-44-45PM.doc			
MICHAEL SABATINO/2001	Allstate Life Insurance Company		\$24,240.00	<input type="button" value="Cover Letter"/>

Cover Letter for -->Allstate Life Insurance, Company

Select template file: C:\SSO\ezbroker\Template\CoveringLetters\coverletter.doc

Generate Cover Letter for:

Select Company: Use:

Generate Cover Letter | Done

FIG 49

Post Settlement Document - Documents (continued)**▪ Creating a Post-Settlement Document from Template**

Settlement Documents for Accepted Quotes

Quote Name > FoxProCase977316

Settlement Document > LLAC Application12-3-200112-58-26PM.doc

Settlement Document > LLAC Application12-3-200112-59-44PM.doc

Select template file LLAC Application.doc

Generate Document Doc Tracking

FIG 50

Document Attachment - Documents (continued)**▪ Attaching a Document for e-filing**

- Any Scanned Data Files
- Any Electronically Generated Documents (Word, Excel, etc.)

Title	File Name	Owner	Remarks	Delete
Birthcertificate	Birth Certificate.doc	super super	Scanned Birth Certificate	Click
School Record	School Record.doc	super super	School leaving certificate	Click
None	None	None	None	None

Case : SABATINO, MICHAEL

Date :

Reference :

File :

Upload

Uploaded file : School Record.doc

More Upload Done

FIG 51

Quote Acceptance Update to Case

- Click on the Quote to view details
- Enter the Date in Quote Accepted Field;
- Don't forget to Save

FIG 52

Quote Verification Update to Case

- HOCA verifies an accepted Quote
 - Current Rate Series
 - Exception of Special Approval of Life Company
 - Underwriting Guidelines
 - One more rule

FIG 53

Tracking Documents

- Track any document from your e-file

Settlement Documents for Accepted Quotes

Quote Name -> MIKEHALL/2002

Select template file: UQA - AAC doc

Generate Document Doc Tracking

Case Name:	Case Number:	Initial Cash Amount:	Policy Numbers:
Life Company: Allstate Life Insurance, Company	Date Settled:		
Premiums: \$14,573.00	Documents completion date:		
Are all documents requirement completed?			
Document Info:	Field Office:	Head Office:	
Sent to:	Will Be Sent:	Received:	Was Sent:
R/Y/D			N/A
Original Application			
Copy of Application			
Copy of Policy Form			
Date Sale Contract Faced			
Date Sold Case sheet approved			
Purchase Date			
Lock-In Sent			
Approved Lock-In Received			

FIG 54

Communicating with Support, Home Office, Clients & Vendors

- Important Communication Check Box on Contact Information in Diary

Edit Contact Information > Broker >> Structured Financial Associates

Contact Category: Private Acting Broker Primary Contact

Prefix: First Name: Middle Name: Last Name: Suffix: Title:

Address:
Address1: PO BOX 1800 City: SALT LAKE CITY UTAH Zip: 84110-1800
Address2: State: UT - Utah Country: Select One

Communication:
Phone: 801-575-7811 (Day) Phone: (Eve.) Cell:
Pager: Fax:

Email: info@sfainc.com

Communication Type: DATA STREAM E-MAIL FAX

Notes:

Update Cancel

FIG 55

Generating Reports

- Go to Reports Tab to Generate following Reports
 - 1. Associates Reports
 - 2. Carrier Reports
 - 3. Defendant Reports
 - 4. Outstanding Reports
 - 5. Insurance Company Reports
 - 6. Custom Reports

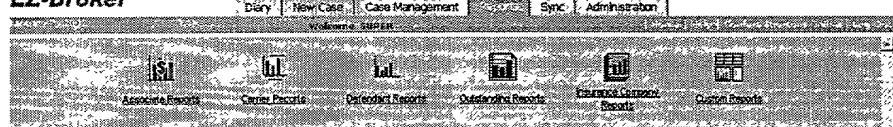


FIG 56

Generating Reports

- Standard Report generating Format (Super User or Executive)

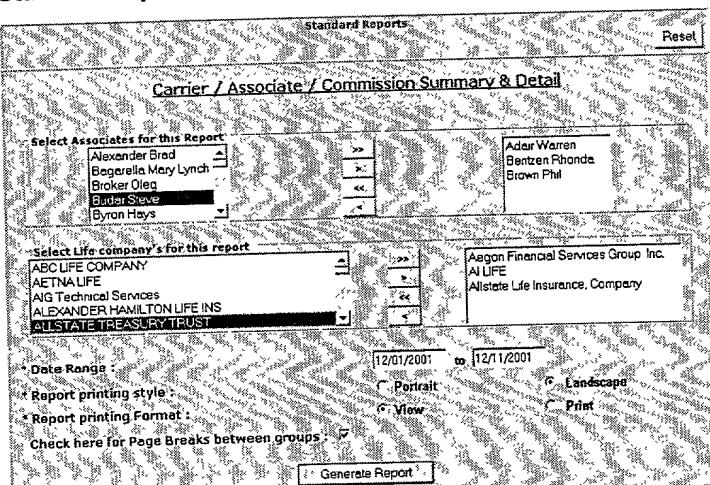


FIG 57

Generating Custom Reports (continued)

- Go to Custom Report Generation

Customized Report

Select Fields

ADJUSTER	ASSOCIATE CODE
ASSOCIATE	AUTHORIZED AMOUNT
ATTORNEY FIRM	CASE NUMBER
CASE NAME	CLAIMANT NAME
CASE STATUS	COMMISSION PAID DATE
CASETYPE	
CLAIMS FILE NUMBER	
COMMISSION PAID	
COMMISSION RECEIVED	
DATE OF LOSS	
DEFENDANT NAME	

MOVE **REMOVE**

Goto... **NEXT >>**

FIG 59

Generating Custom Reports (continued)

Customized Report - Step 2

Select conditions for Report

For date values please enter values in [mm-dd-yy] format.

DEMAND AMOUNT : 20000 Add Condition

MS_BROKER_ASSOCIATE_TITLE = 'Sam'
CASEINFO CASE_CAPTION = 'Ion hatcher'
ASSOCIATE_COMMISION_NET_ASSOCIATE_PREMIUM_AMOUNT > 10000 Delete Condition

Select Grouping Columns and Aggregates

SUM	AUTHORIZED AMOUNT	ADJUSTER
Avg	COMMISSION RECEIVED	ASSOCIATE
MAX		ASSOCIATE CODE
MIN		ATTORNEY FIRM
COUNT	BY	AUTHORIZED AMOUNT
	Of	

SUM(CASE_INSUREAUTHORIZED_AMOUNT) BY MS_BROKERASSOCIATE_TITLE
SUM(ASSOCIATE_COMMISION_NET_BC_COMM) BY MS_BROKERASSOCIATE_TITLE

Add Group Delete Group

Cancel Proceed to Step 3

FIG 60

Generating Reports

- Standard Report generating Format (Associate, Support or Client)

Standard Reports

Associate Visit to Insurance Company - Summary

Click here for Insurance company list: [A] [B] [C] [D] [E] [F] [G] [H] [I] [J] [K] [L] [M] [N] [O] [P] [Q] [R] [S] [T] [U] [V] [W] [X] [Y] [Z] [All]

Select Insurance company's for this report:

A GUILFORD TRANS INDUSTRIES CO
AM LITHOGRAPHY
AAA MountainWest Ins Co
ACCELERATION NATIONAL INS
ACCIDENT FUND COMPANY

Date Range: 12/1/2001 to 12/1/2001

Report printing style: Portrait

Report printing Format: Landscape

Generate Report

FIG 58

Generating Custom Reports (continued)

Customized Report - Step 3

Pick the Report Options

Custom Report Title: _____

Custom Report Sub-Title: _____

Select Print Option:

Portrait Landscape

Include page-breaks between groups

Select an Option for the report:

Print Report [This will automatically redirect me.]
 View Report [The report will be opened within.]

Save Report Query: _____

Enter Report Name: monthly reports

Goto...

FIG 61